

Defense Travel System

Help Desk

Concept of Operations

Version 2.0

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***PROJECT MANAGEMENT OFFICE
DEFENSE TRAVEL SYSTEM
HELP DESK CONCEPT OF OPERATIONS***

1. Introduction

The Defense Travel System (DTS) is a state of the art initiative designed to make DoD business travel (TAD/TDY) “quicker, easier and better”. The DTS is based on the Common User Interface (CUI) and its interfaces with other DoD and commercial systems. Operation and maintenance of these separate individual systems are the responsibility of their respective process owners, but when “lashed up” they constitute the overall end-to-end Defense Travel System. Because of the complexity and number of systems involved in the DTS, there is a need for a comprehensive and multi-tiered help desk system to support travelers, Authorizing Officials (AO's), Defense Travel Administrators (DTA's), and other users. This high level document describes the DTS help desk system architecture, roles, and responsibilities. **This is not a detailed SOP.** This is a living document and will be revised as needed during the deployment process.

The Project Management Office (PMO) DTS is developing service level agreements and detailed Help Desk procedures at the higher echelons of the system. **Development of specific post, camp, station and base SOPs are the responsibility of the Services and Agencies.**

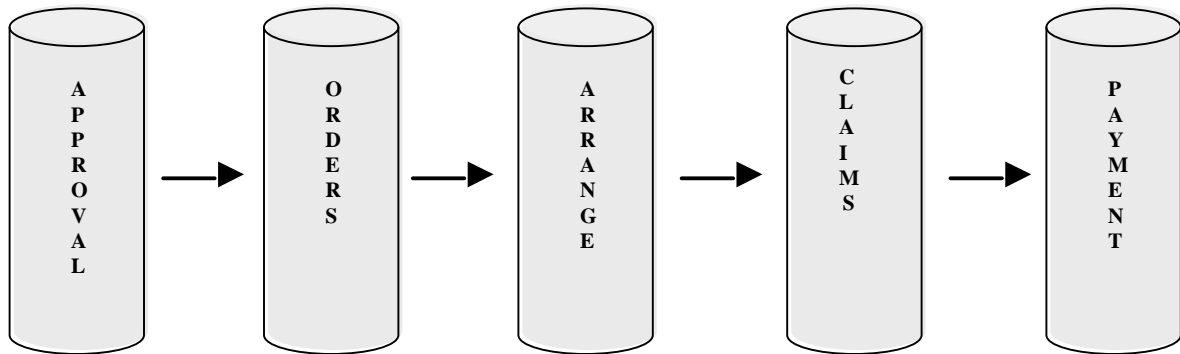
2. Background

The current high cost, labor intensive, manual system of travel initiation, order preparation, travel arrangements, travel claims submission, voucher computation, and voucher payment is distributed throughout a multitude of DoD organizations. Most organizations have some sort of internal process for orders approval through claim submission. Voucher processing and payment is generally more centralized through the use of Service and Agency payment offices and the Defense Finance and Accounting Service (DFAS). Each of these manual, stovepipe process organizations usually has a readily identifiable process owner or manager who can answer questions or solve problems within their area of responsibility. The present system is conceptually shown below:

Current System

➤ Distinct stove pipes

➤ Easy to pinpoint where problems occur

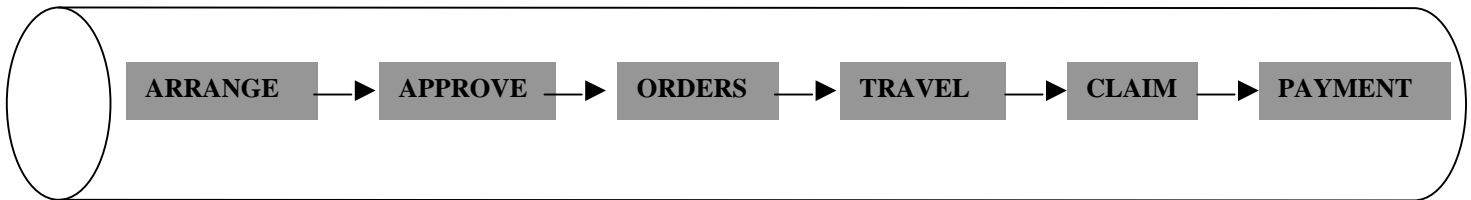


The DTS is a reengineered, automated end-to-end system that substantially increases customer service and mission support while at the same time drastically reducing administrative costs and overhead. This is accomplished through the use of DoD and commercial communication networks to connect the traveler and travel administrators to centralized CUI processors at the TRW regional data center and to the servicing commercial travel office (CTO). Additionally, electronic transmission of claim information is made to DFAS, and payments are electronically routed to the traveler's bank account. The traveler can also direct that travel expense payments be electronically deposited into their government sponsored travel card account.

Since the reengineered DTS system functions in an electronic rather than a paper environment, the organizational structures and process flows related to business travel are somewhat changed. Rather than a distinct series of stovepipe processes, the DTS can be thought of as an integrated electronic information-processing pipeline. As illustrated below, this new structure requires a different type of system to assist users when they experience a problem or require information.

Defense Travel System

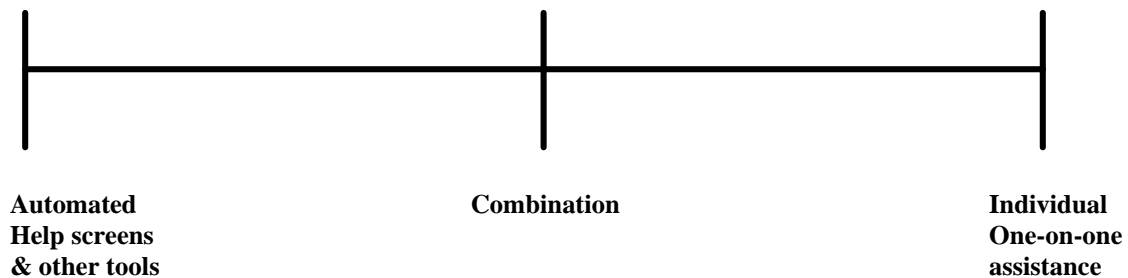
- **Integrated process flow**
- **A Help Desk is required because it can be difficult for the traveler to pinpoint when and where problems occur**



3. Help Desk Objective

The objective of the DTS help desk system architecture is to ensure customer satisfaction and mission accomplishment by resolving problems at the lowest appropriate organization level. Data will also be collected to assess overall system performance and aid in DTS process improvements. As illustrated below, a continuum of assistance is available to perform the help desk function:

Customer Support Continuum



4. Integrated System Approach

The DTS is based on the common user interface (CUI) and its interfaces with other DoD and commercial systems. These individual systems are the responsibility of their process owners, but when linked together constitute the end-to-end DTS. The following is a list of the systems making up the end-to-end DTS and the primary organization responsible for each:

System:	Responsible Agency:
Public Key Infrastructure(PKI)	Defense Information Systems Agency (DISA)
Common User Interface (CUI)	TRW (Contractor) & PMO-DTS
Virtual Public Network (VPN)	DISA/Services/Agencies
Electronic Commerce Processing Node (ECPN)	DISA
Defense Accounting & Disbursing System (DADS)	Defense Finance and Accounting Service (DFAS)/Services/Agencies
Electronic Funds Transfer (EFT)	Federal Reserve Bank (FEDLINE)
Financial Institutions	Numerous commercial financial organizations
Archive/ Management Info System	Defense Manpower Data Center (DMDC)
Installation ADP/Network Infrastructure	Installation
Government sponsored charge card	DFAS (Bank of America)
Travel arrangements	Travel Services Contractor

5. Help Desk Procedures

The DTS Help Desk architecture contains a three tier support structure, and is illustrated in Appendix 1.

a. Tier 1, the user level, is the first element of support. This tier is primarily the support systems available to the traveler, the DTA, and the Authorizing Officials (AO). This includes training materials received from trainers, Computer Based Training (CBT), help screens within the DTS CUI, frequently asked questions (FAQ) via the DTS and TRW web sites, and the government charge card vendor (for billing inquiries and problems). When faced with a question or problem the traveler or AO is expected to:

- Gather information or data about the problem or question
- Attempt to determine the probable problem source
- Engage all level one sources to help solve the problem or answer the question
- If the problem or question cannot be resolved, escalate it to the tier 2 level

b. Tier 2 is the servicing CTO and the DTA Help Desk. This is the next level available to support the traveler or AO for solving problems or answering questions.

Travelers will contact the CTO for travel arrangement problems or travel changes after commencement of travel. The types of services provided by the CTO to DTS travelers are essentially the same as those provided under the current manual processes.

The DTA Help Desk will support the end-user with all other problems or questions. *Contacting the DTA help desk is appropriate after the traveler or AO has exhausted all means of solving the problem at their personal level.*

The DTA Help Desk will field problems and questions on topics such as: software and CUI use, entitlements, travel policy issues, transaction problems, payment problems, contract performance issues, etc. *Many similar functions are currently being performed locally under the manual processes. The DTA Help Desk will formalize many of these existing support processes and procedures.* It is the responsibility of each Service and Agency to determine where the local DTA Help Desk is located, and how it is to be staffed and organized.

The DTA Help Desk has as its support resources the CUI software with DTA permissions set, training materials from trainers, CBT, the CTO, DTS and TRW web sites, and the government travel card vendor. At the tier 2 level examples of some functions include:

- Acknowledge help requests from tier 1
- Be knowledgeable on the system and very qualified to handle problems appropriate to the DTA level
- Review data provided by tier 1 and other DTA Help Desks
- Gather additional data as needed
- Engage other tier 2 resources or associates in problem solving activities
- Resolve tier 2 problems accurately
- Inform the problem owner of action status and when the problem is resolved
- Escalate problems to tier 3 only when all tier 2 means are exhausted

Additional information on organizing the Tier 2 Help Desk is located in Appendix 2.

*c. **Tier 3*** is the final level of DTS support. This includes TRW and DISA as the supporters of this tier. The main purpose of this level is to provide direct support to the DTA for those questions or problems that cannot be resolved at the tier 1 or 2 level. The DTA is not expected to have the knowledge, capabilities, or resources to troubleshoot problems occurring in the Defense Travel System outside of normal CUI and base level operations. DISA and TRW centralized help desks are equipped with the specialized resources, points of contact (will be provided during training), and technical knowledge to coordinate problem resolution at the higher system levels.

*The DTA Help Desk will contact the tier 3 only after all tier 2 resources have been exhausted and all means of solving the problem have been explored. Each **DTA will have a DTA identification number to gain access to the tier 3 Help Desk.** DTA access numbers will be distributed during the deployment process.*

Only in limited circumstances (such as an after hours emergency) will the tier 3 Help Desk communicate directly with a traveler or DTS end user. *This is because the vast majority of common questions or problems with DTS can be solved at the DTA or user level.* In other cases, problems will require prior verification by the DTA that they are not due to base level hardware and software difficulties, or that they cannot be corrected within the CUI database by either the traveler or the DTA. For example, in the case of a non-receipt of a EFT payment, the DTA would first work with the traveler to verify that the bank account information in the traveler's profile was correct prior to reporting the non-EFT receipt as a problem that required DISA and DFAS action. As another example, slow CUI response time could be a TRW problem, a NIPRNET problem, or a base LAN problem. In this case, the DTA is expected to check with the local base Information Technology or Information Systems staff and verify that the problem does not lie at the base level before reporting it to the DISA Help Desk.

The TRW Help Desk will resolve problems or questions relating to CUI issues or performance that are forwarded upward by the DTA or travel services contractor. DISA centralized help desks will be the single point of entry for problems or questions outside of the CUI. For example, some of these problems may involve the PKI, NIPRNET, ECPN, VPN's, DFAS, and non-receipt of EFT into the traveler's bank account or travel charge card account, etc. Resolution of problems forwarded to the tier 3 level may involve multiple technical areas and require cross-functional research between TRW, DISA, and other government and commercial organizations.

As mentioned above, the DTA will be expected to research and verify that the problem or issue is outside of their direct control prior to forwarding problems to the tier 3 level. Once a problem is accepted at the third tier, it is extremely important that the DTA and their customers be kept abreast on the status of the problem and resolution. At the tier 3 level, some functions include:

- Acknowledge assignments from tier 2 service providers
- Review data provided by the problem owner (from both tier 1 and 2)
- Gather additional information as necessary
- Engage resources necessary to solve the problem
- Oversee and coordinate resolution activities
- Document current status in the call tracking/problem management system
- Periodically communicate problem status to the tier 2 DTA Help Desk
- Document the resolution
- Inform the tier 2 DTA Help Desk when the problem is resolved

Problems may be elevated to tier 3 help desks via telephone call, e-mail, or FAX. A web browser trouble ticket system is also in development. Tier 3 Help Desks will utilize automated call tracking systems and a shared knowledge base to track problems and record lessons learned. Detailed tier 3 standard operating procedures (SOPs) will be provided to DTAs prior to their organization's transition to the DTS.

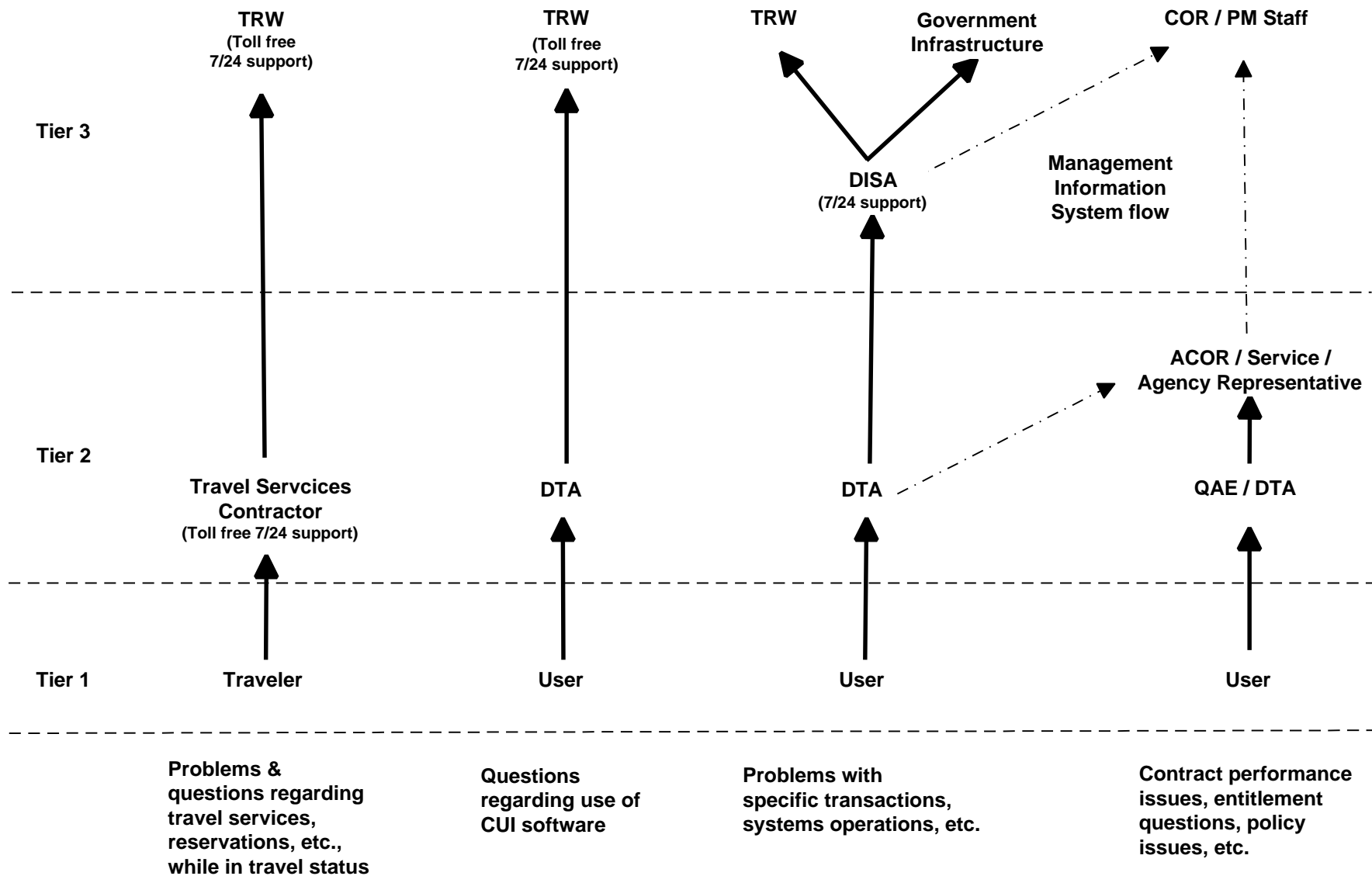
Appendix 3 contains general problem resolution flow charts for tiers 1, 2, and 3. Detailed SOPs are in development.

6. Help Desk Overview Training

Overview training on the DTS Help Desk System will be provided by the PMO training team during DTA training. Each organization and DTA will then need to study and decide how to structure and staff its DTA Help Desk. The PMO staff, along with Service and Agency representatives, can also provide DTAs with supplemental training, advice, and answer questions regarding setting up a DTA Help Desk.

7. Automated Method for Forwarding Problems to Tier 3 Sources

The PMO has developed a program which allows DTA's to electronically forward trouble tickets to the appropriate tier 3 agency for resolution. The program uses the access data base system which will be on a set of installation diskettes included in your DTS packet. Instructions for installation are include with the packet.



Appendix 1 - DTS Help Desk

Appendix 2 - DTA Help Desk Management

The ease of transition to DTS and long term customer satisfaction is to a large part dependent on the quality of local training provided to users and travelers. An effective DTA Help Desk is also key. This is particularly the case during the start-up phase where travelers and users will be inexperienced in the use of DTS.

1. Discussion

It is the responsibility of each command and DTA to thoroughly evaluate their organization structure and mission to determine how best to support or staff the DTA Help Desk. The DTA Help Desk can be centrally located, or functional experts can reside in different work areas. Help desk positions may be full time or collateral duty. Some organizations may choose to set up a dedicated full time help desk, others may decide on a matrix organization with a central point of contact who can refer problems or questions to local functional experts when necessary. Other organizations may choose some sort of combination. Similar help desk responsibilities are already being performed in many organizations, personnel performing these duties could be prime candidates for the DTA Help Desk.

To ensure proper support, it is suggested that the DTA Help Desk include a designated *Help Desk Manager* who is responsible for the overall operation of the help desk. Included in the DTA help desk organization should be designated personnel or points of contact that are from local *training, information technology, finance, and transportation* functions.

The local DTS Help Desk should be reachable during normal working hours and have one or more telephone numbers and e-mail addresses. DTAs need to develop local Help Desk SOPs and provide this information to travelers, AOs, and other users. DTAs also need to develop local procedures for handling emergency travel requirements during non-working hours and for dealing with urgent problems that occur when the help desk is not staffed. Most urgent problems which occur after normal working hours will be related to travel arrangements; these will be handled by the commercial travel office (CTO) on a seven days a week, 24 hours per day basis. The help desk can handle most other problems that don't involve travel arrangements during normal working hours.

It is suggested, but not mandatory, that the following be used to facilitate the DTA Help Desk:

- Document all problems and questions in a call tracking and problem management system. This can be either paper or computer based.
- Document problems and their resolutions in a local knowledge base. The local knowledge base will serve to record lessons learned and facilitate sharing of information by help desk and training personnel.

- Regularly utilize the local knowledge base to keep abreast of common problems and how to resolve them.

As discussed above, the staffing and organization of the DTA Help Desk is totally at the discretion of each organization. Service and agency headquarters will provide further guidance and advice if requested.

2. Recommended DTA Help Desk functions and responsibilities

a. Help Desk Manager: This person is responsible and accountable for the operation of the Help Desk. Specific responsibilities may include:

- Establish a help desk training program and cross train staff members on DTS functions
- Organize and distribute work schedules to ensure proper support
- Ensure that help desk staff are carrying out local help desk and DTS policies
- Ensure that all call tickets are promptly answered or elevated to next level when appropriate
- Maintain a local knowledge base of help desk calls
- Utilize metrics to track overall help desk performance
- Assess help desk performance, make recommendations and execute improvements

b. Training Personnel can be tasked with addressing training problems and answering CUI questions. They are the local experts on the CUI and understand how the various DTS systems work together. Other responsibilities include:

- Train the help desk staff on CUI operations
- Understand CBT and how it's applied to individual traveler and AO training
- Thoroughly understand the training modules
- Have a thorough knowledge of simplified entitlements
- Assist commanders in designing and maintaining effective DTS training program
- Address training questions with their Service or Agency representative and the PMO Training Staff
- Research technical issues
- Be responsible for timely and accurate problem resolution
- Utilize the knowledge base to improve local training
- Include frequently asked questions in the knowledge base

c. Information Technology Representatives serve as the Information Technology (IT) POCs for the help desk, and will field IT related questions. Other responsibilities include:

- Research technical issues and provide responses
- Solve IT problems occurring at the installation and DTA level which impact local functioning of the DTS

- Elevate IT problems to TRW and DISA only after verifying the problem does not reside at the installation
- Maintain liaison with installation hardware, software, and network personnel
- Monitor frequently asked questions to add to knowledge base

d. Finance Representatives serve as the finance POCs for the help desk, and will field all financial questions or problems. Other responsibilities include:

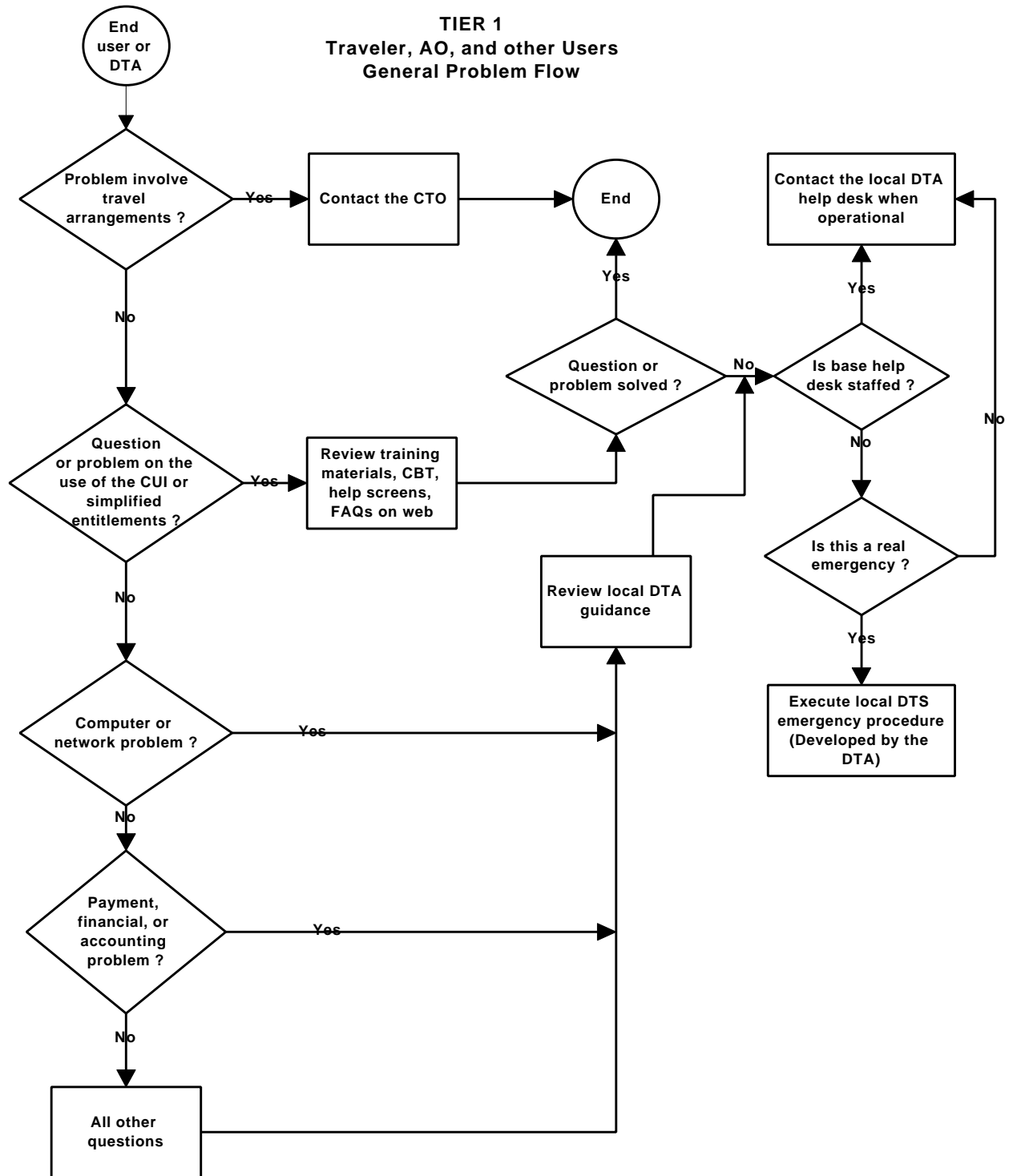
- Understand the overall DTS system
- Have a thorough knowledge of simplified entitlements
- Develop expertise on lines of accounting and centrally billed accounts (CBA)
- Cross-train other help desk personnel on financial matters and financial systems pertaining to the DTS
- Monitor frequently asked questions to add to the knowledge base
- Elevate specific transaction problems to TRW and DISA only after all local resources have been exhausted to resolve problem

e. Transportation Personnel will field all non-routine transportation and travel policy issues. Other responsibilities include:

- Develop expertise on the transportation modes of travel and best use of each
- Have knowledge of group and individual travel
- Have knowledge regarding Air Mobility Command (AMC) controlled and operated airlift
- Have knowledge of transportation policy and procedures
- Actively liaison with the CTO, Service or Agency representatives

Appendix 3 - General Problem Resolution Flow Charts

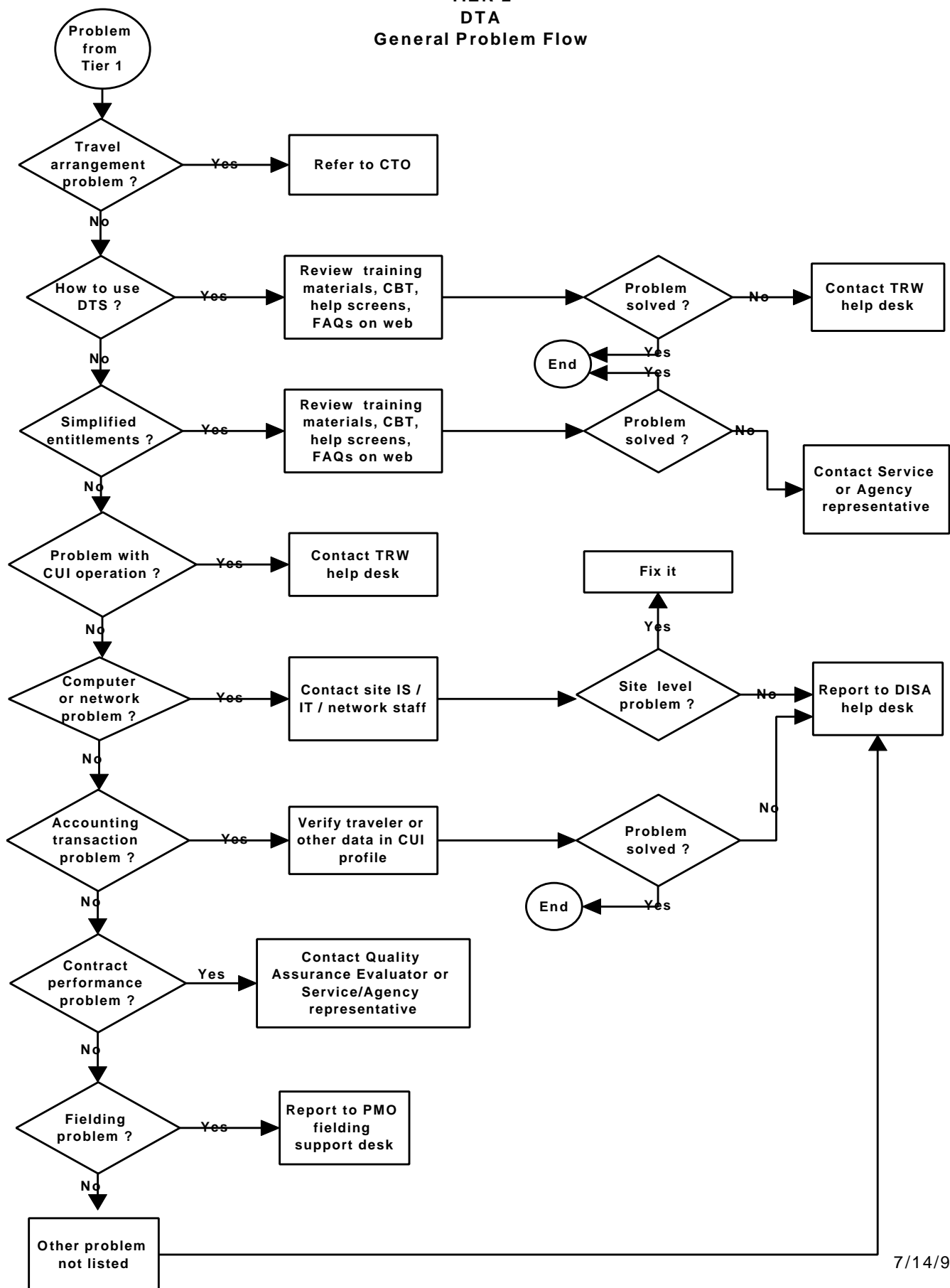
The following pages show the general problem resolution processes for the traveler and AO level (tier 1), the DTA level (tier 2), and at the system level (tier 3). Detailed SOPs are currently being developed.



NOTE: Each DTA is responsible for developing local policies and procedures for use at the Tier 1 level. The general logic flow is an example of how local procedures could be setup.

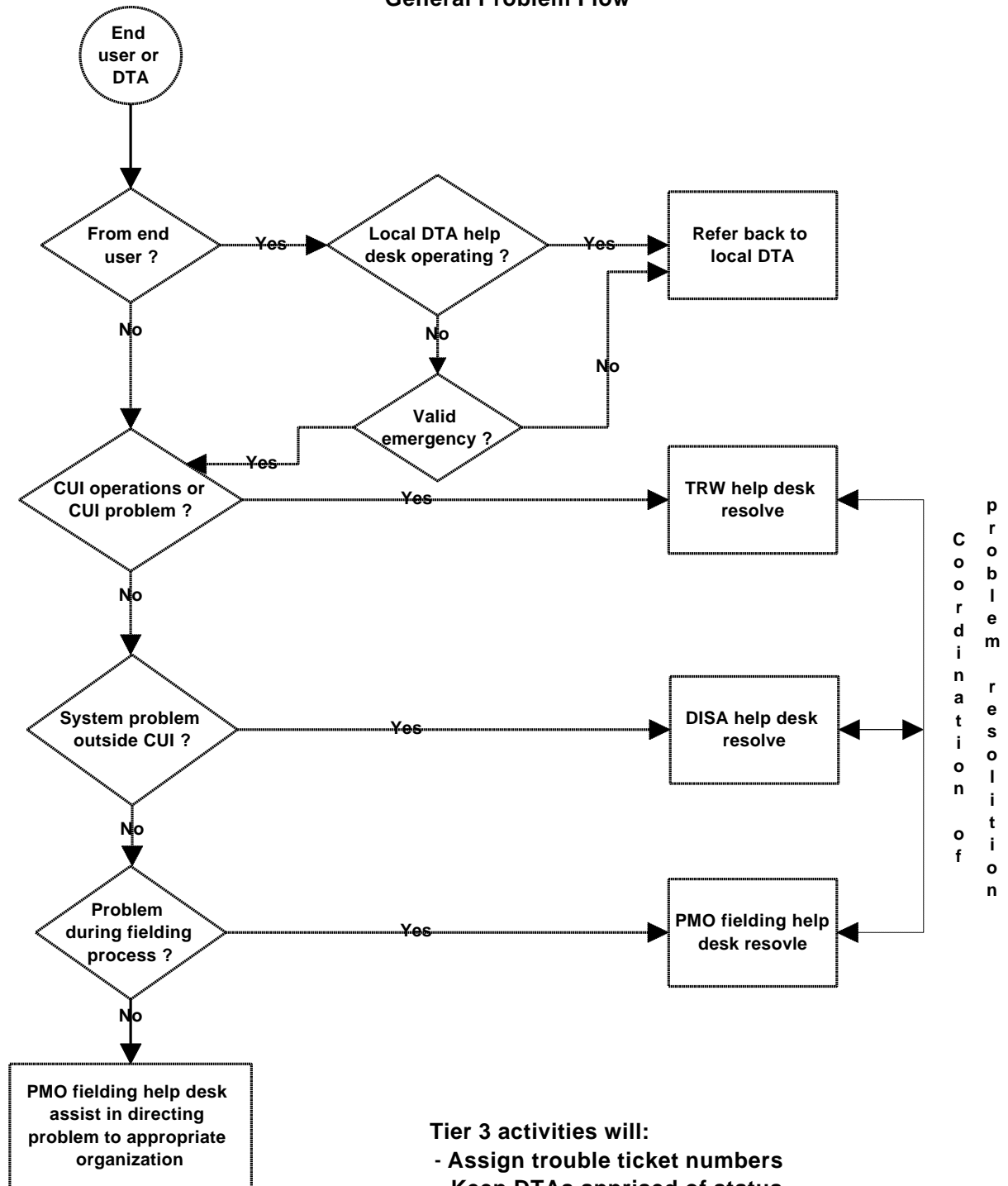
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**TIER 2
DTA
General Problem Flow**



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**TIER 3
System Help Desk
General Problem Flow**



Tier 3 activities will:

- Assign trouble ticket numbers
- Keep DTAs apprised of status
- Advise DTAs when problems are resolved
- Input problems & resolutions into a shared knowledge database
- Report system metrics to the PMO to aid in continuous process improvement